

Chair's "Day of" Checklist Offsite/Section Meeting CLE



Date: June 23, 2020

- **Prior to event, obtain from CBA:**

- Registration list
- NY CLE verification form if NY CLE credit offered
- Course survey forms
- Name tags (if needed)

- **At Check-In:**

- Check attendees in on the **registration list** as they arrive, so as to make clear who is and is not in attendance. Please add the name of any walk-in attendees.
- Have attendees **sign in to verify their attendance**. Note that only attendees that attend the entire program will receive CLE credit from the CBA. Under the Connecticut MCLE rule, those who arrive late or leave early may claim credit for themselves, and record it in their CBA CLE Tracker in their online member profile.
- If New York credit is offered, provide attendees with a NY verification form and have attendees sign in.
- Distribute **surveys** and request that they are turned in at the end of the program
- Distribute name tags (if available)

- **Should you get walk-ins:**

- Add walk-in names to the registration list
- Have walk-ins sign in and provide their email
- Collect payment. Payment on-site may be by check, cash, or credit card. For the latter, have the attendee complete a CBA event registration form with their credit card information
- Inform walk-ins that CBA will email them course materials (if applicable)

- **At the end of the program:**

- Have attendees sign-out for NY CLE credit
- Collect surveys and any NY verification forms
- Return registration list; sign-in sheet; and any surveys, verification forms, and payments from walk-ins to CBA. If cash payments are collected, write a check to the CBA in the amount of the cash payments and send along with any other check payments collected to the CBA. If no cash or check payments are collected, then scanning all documents to sperrin@ctbar.org is an option.